



ASSESSMENT REPORT

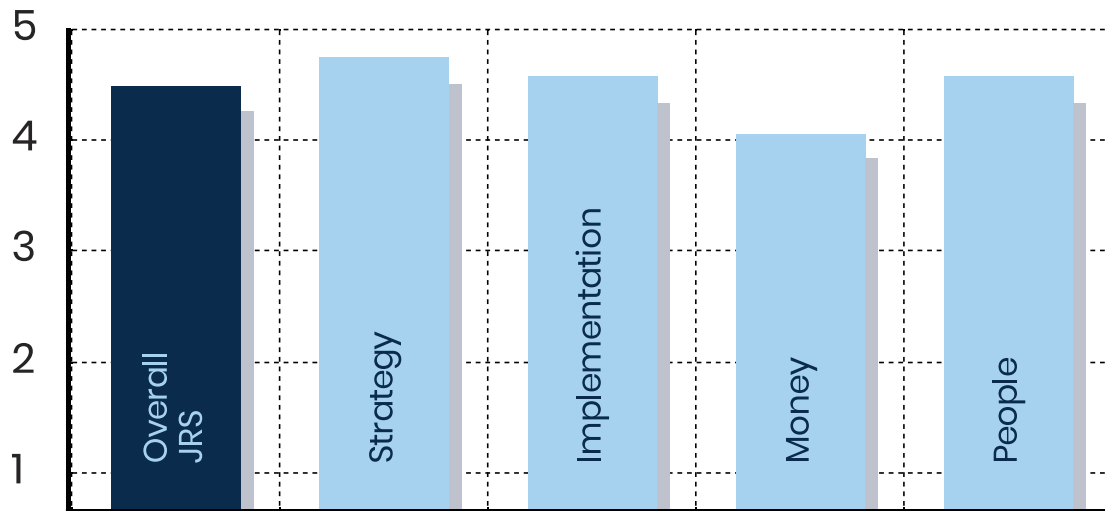
The Journey Assessment - Non-Profit

ASSESSMENT DATE: 04.22.2021

PRESENTED BY:



OVERALL JRS SCORE



Exile International

This score represents an organization that demonstrates maturity of thought and action at multiple levels. This score indicates your organization is mastering the principles required to grow and scale the business. Organizations achieving this high score will deliver significant impact to the people they serve and the investors that support them.

Your score reflects maturity of thought in business behaviors. Few organizations make it here. Take a moment to celebrate what your team has achieved. Your next steps are to strive for mastery of thought and correct behavior throughout the entire team, which requires discipline and follow through on all levels.

To grow and scale departmental and team leaders need to:

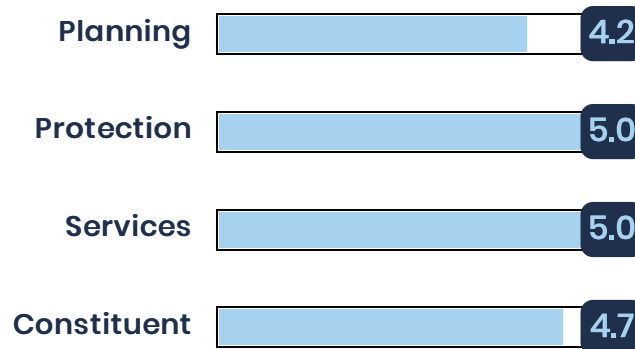
- drive out any reactivity in the process
- see three (3) years out and create an actionable and effective plan
- measure and analyze business units to drive their own improvement
- create strategies and solutions that drive departmental scale and growth
- consistently follow through with the plans created

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STRATEGY



Congratulations! This score represents an organization that demonstrates the highest level of maturity and capability in both thought and action. This score indicates your organization has achieved high levels of involvement and integration at all levels. Organizations achieving this high score demand the highest values on exit.

Celebrate with your team. You have climbed the mountain!

STRATEGY / PLANNING



Identity Statements

Identity Statements consist of the Mission, Vision, and Core Values and represent the essence of the organization's identity - the beliefs, motivations, and priorities that define how an organization does business. These statements articulate and support the organization's goals, shape the culture, and reflect how the organization behaves. Identity Statements are sustainable in the longer term.

Current State Level 5

The Board of Directors has clearly defined the Mission, Vision, and Core Values. Identity Statements direct all behavior, decision making, and strategic initiatives throughout the business.

The staff discuss the Identity Statements on a monthly basis. All staff can repeat the Identity Statements from memory. All managers use the Identity Statements in staff evaluations. The staff understand that their demonstration of the Identity Statements is non-negotiable.

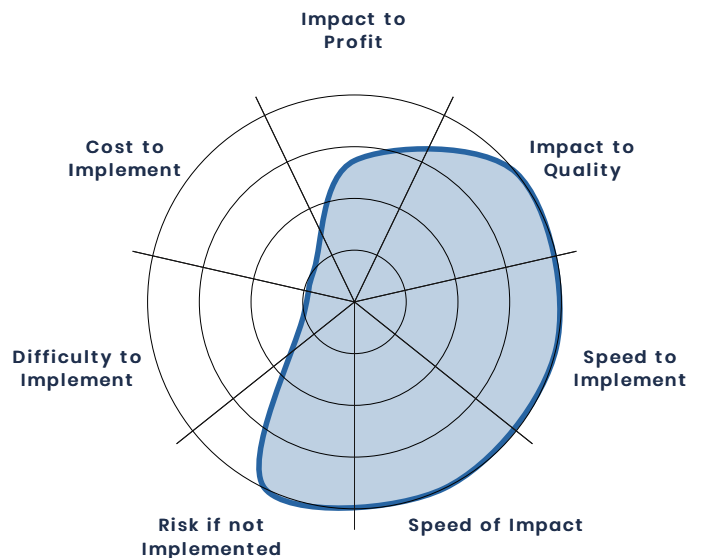
Staff often report that the Identity Statements and resulting culture are strong recruiting and retention tools.

Clients are regularly informed of the Identity Statements and asked if they are evident in the actions of staff.

Improvement Actions:

Congratulations! Your organization is demonstrating the highest level of readiness and maturity in this principle. You should celebrate this accomplishment and the work it took to get to this level.

Remain intentional and focused. Have a plan so the organization can sustain this maturity level in the long term.



STRATEGY / PLANNING



Board of Directors

Boards can play many different roles according to the needs of the organization. These roles may include governance, advising, working, fundraising, etc. The Board is subject to the organization's By-Laws, which include detailed instructions on how the Board should be organized and how it should execute its duties. Non-profits that are organized as corporations are required by law to have a Board of Directors. While unincorporated organizations are not legally subject to this rule, best practice states that these types of organizations should also operate with a Board.

Current State Level 5

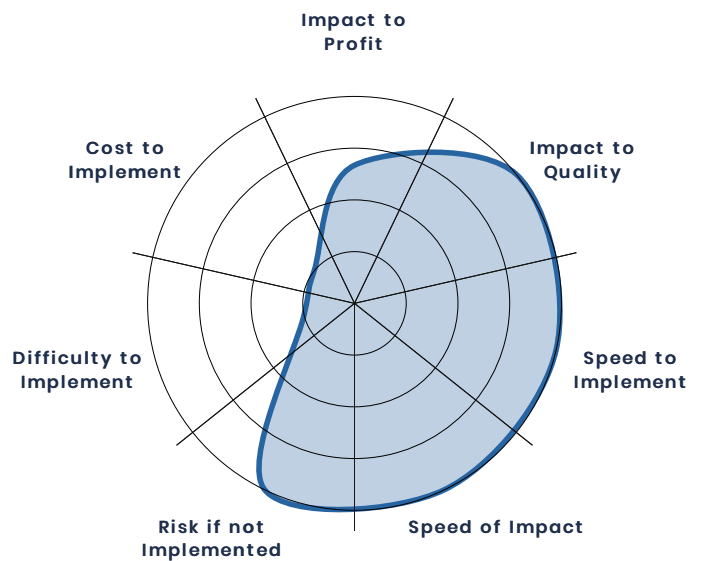
The organization understands the importance of having a strong Board of Directors to guide the organization and balance the power of staff. The Board operates from a clear understanding of its purpose, role, authority, and composition as articulated in the By-Laws.

The Board is composed of a diverse group of individuals who provide a healthy balance of perspectives. Board members consider meetings to be productive and efficient. The Board meets on at least a quarterly basis. Staff are confident that the Board represents their interests and the interests of their constituents.

Improvement Actions:

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STRATEGY / PLANNING



SWOT/TOWS Analysis

A SWOT Analysis is a documented analysis of the Strengths, Weaknesses, Opportunities, and Threats of an organization's current status. The TOWS Analysis is a similar analysis that evaluates Threats, Opportunities, Weaknesses, and Strengths in the order of actual problem solving. The two create a body of data that informs strategic planning.

For the purposes of this principle, the management team may be interchangeable with the Board of Directors.

Current State Level 4

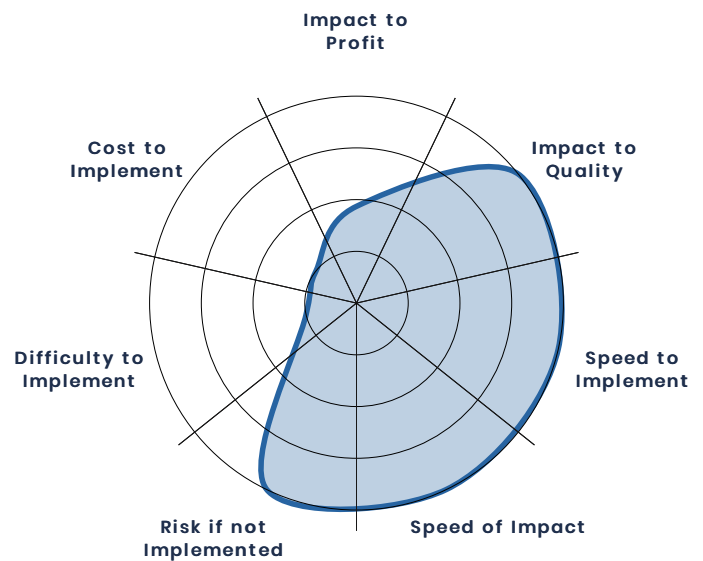
On an annual basis, the management team conducts both SWOT and TOWS analyses and uses the findings to begin the strategic planning process. The management team then creates a documented and actionable strategic plan that directs the operations of the organization.

The management team informs all relevant support staff of the results of the analyses in order to increase ownership across the organization.

The management team reviews the SWOT and TOWS on a quarterly basis to evaluate how the organization is responding.

Improvement Actions:

- Key members of the support staff should be included in the SWOT and TOWS analysis to provide a well-rounded body of data for the management team to assess.
- The strategic plan should be between 1 and 3 years in scope.
- The management team should then increase SWOT/TOWS review to a quarterly basis.



STRATEGY / PLANNING



Strategic Planning

Strategic Planning, or Business Planning, is the annual process of either creating or reviewing a documented strategy that defines the direction of the organization and informs decisions about allocating resources towards that direction.

For the purposes of this principle, the management team may be interchangeable with the Board of Directors.

Current State Level 3

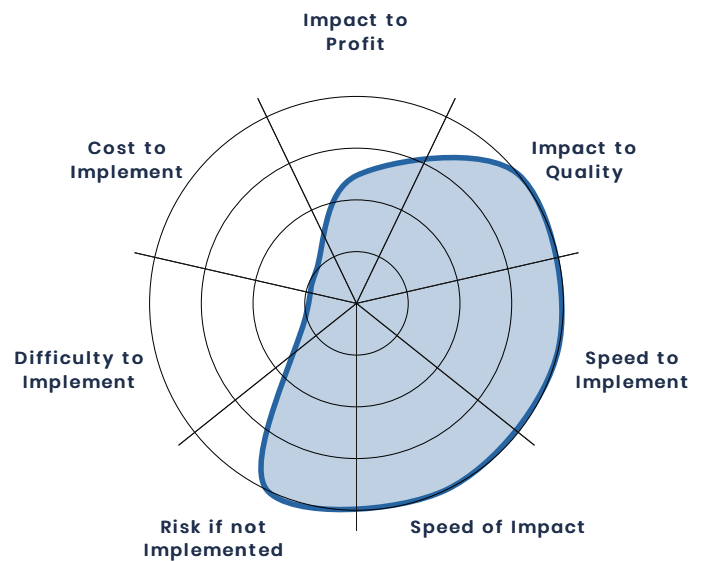
On an annual basis, the management team creates the strategic plan starting with a SWOT analysis and including strategic goals for the organization and ways to measure those goals. The strategic plan is at least 1 year in scope. The strategic plan is used in some parts of the organization as a basis of decision making, goal setting, and planning.

The management team reviews the strategic plan on at least a 6-month basis to evaluate the progression of the organization and adjust accordingly.

The plan is reviewed at the end of year to see how the organization progressed and to make strategic decisions for the following year.

Improvement Actions:

- The management team should invite each department to inform and review the strategic plan in order to create a culture of strategic planning throughout the organization and increase staff ownership of the plan.
- From this collaboration, the management team should create a strategic plan that is at least 3 years in scope. The strategic plan should be used in all parts of the organization as the basis of decision making, goal setting, and planning.
- Each department should be encouraged to frequently evaluate its part of the strategic plan.
- The management team should increase its review of the strategic plan to quarterly to evaluate the progression of the organization and adjust accordingly.



STRATEGY / PROTECTION



Establishing Documents

Establishing documents include an organization's By-Laws, Charter, and 501(c)3 tax exempt status. Depending on the purpose of the organization, these documents may also include additional policies pertaining to the behavior of the Board of Directors, such as a Conflict of Interest Policy. Establishing documents are legally binding and are necessary to maintain good standing with local and federal governments.

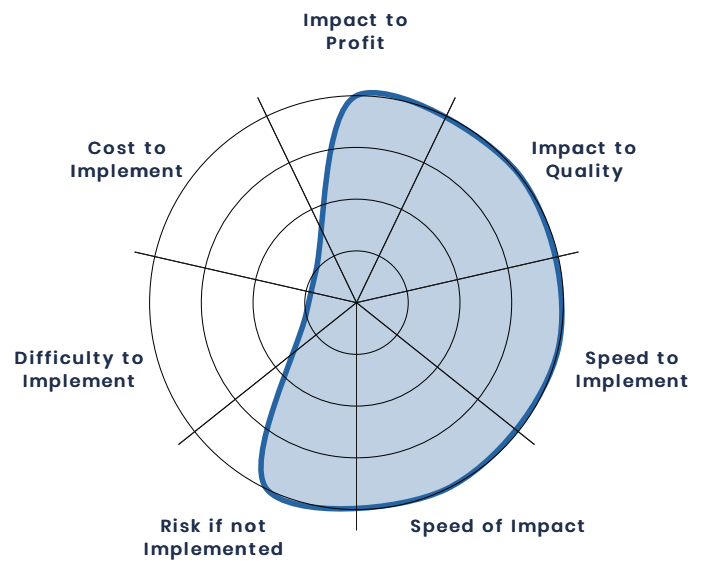
Current State Level 5

At its inception, the organization created establishing documents according to best-practice and legal standards. The Board of Directors then approved those documents. The organization then filed those documents with all appropriate local, state, and federal authorities, including the IRS for tax-exempt status. The whole organization acts in accordance with the standards of behavior outlined in its establishing documents, from Board of Directors to support staff. The Board reviews the documents on an annual basis and any changes are made in accordance with the procedures outlined, and are immediately registered with the appropriate government departments.

Improvement Actions:

Congratulations! Your organization is demonstrating the highest level of readiness and maturity in this principle. You should celebrate this accomplishment and the work it took to get to this level.

Remain intentional and focused. Have a plan so the organization can sustain this maturity level in the long term.



STRATEGY / PROTECTION



Insurance and Protection Policies

Insurance is a form of risk management that seeks to guard from financial loss. Depending on the purpose of the organization, non-profits may be required to carry insurance to cover anything from Board Members to transport vehicles.

Protection policies are documented expectations that clearly state how the organization plans to mitigate risk and respond to infractions. Protection policies include the organization's rules of engagement for how representatives of the organization will interact with different groups of stakeholders. The Policies also define how the organization will react if these rules of engagement are broken. Depending upon the purpose of the organization, protection policies may be both internal and external.

Current State Level 5

The management team reviews all business and regulatory needs annually and seeks qualified guidance on best-practices in protection. The management team then identifies which potential threats can be covered by insurance and which can be covered by internal protection policies.

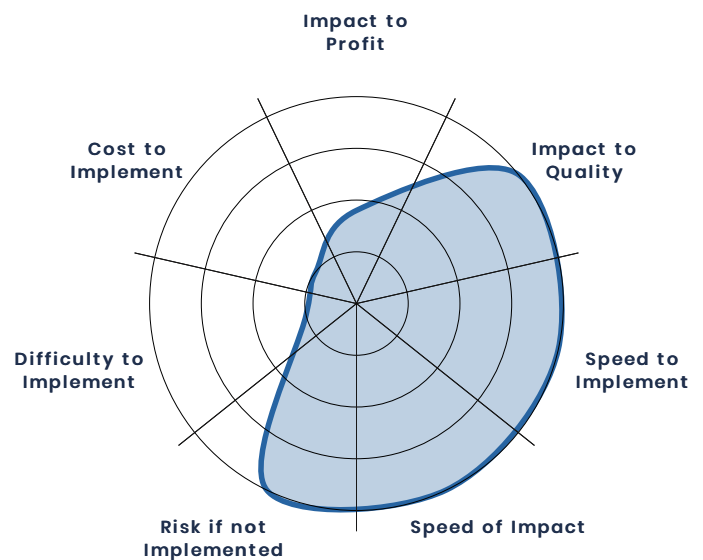
For those liabilities covered by insurance, the management team pursues quality coverage and reviews this coverage annually. For liabilities covered by protection policies, the management team creates clear, detailed policies that comply with both legal standards and best practices.

These policies are reviewed annually. New staff are trained on policies during onboarding and all staff review policies at least annually.

Improvement Actions:

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STRATEGY / PROTECTION



Continuity Planning

Continuity planning is the creation of a system of prevention and recovery from potential threats to an organization. The plan ensures that key personnel and assets are protected and are able to function quickly in the event of a disaster.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 5

The Board of Directors has created an Impact Analysis that identifies key personnel, resources, or organizational functions that are critical to the ongoing operations.

For each item identified in the analysis, the organization has created a specific plan that identifies the steps required to recover from the loss.

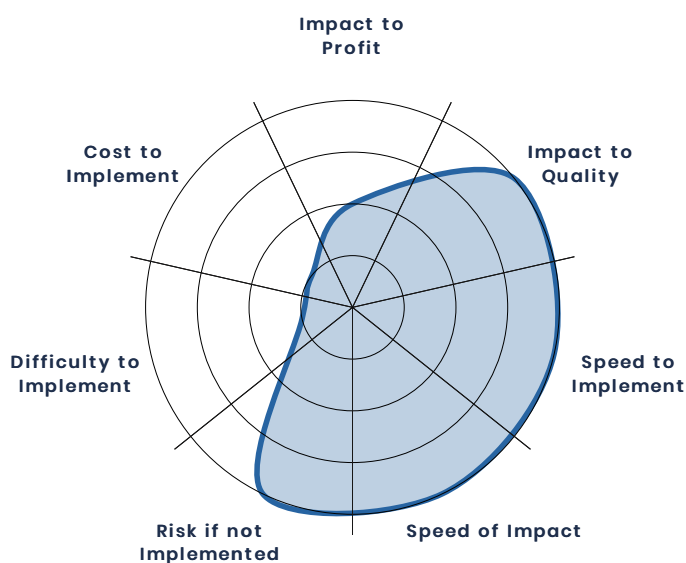
Critical operations (items that require full recovery within 30 days or less) identified in the plan are fully tested and all personnel required to facilitate the recovery are trained in the recovery.

Where possible, the organization has implemented safeguards and procedures to mitigate the risks. On an annual basis the plan is reviewed by the Board of Directors and outside consultants for completeness and ability to actually fund the plan.

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STRATEGY / SERVICES



Value Proposition Design

Value proposition design is the process of designing a plan for a potential service or product that clearly articulates how the offering meets what the target constituent wants or needs to the greatest possible extent.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 5

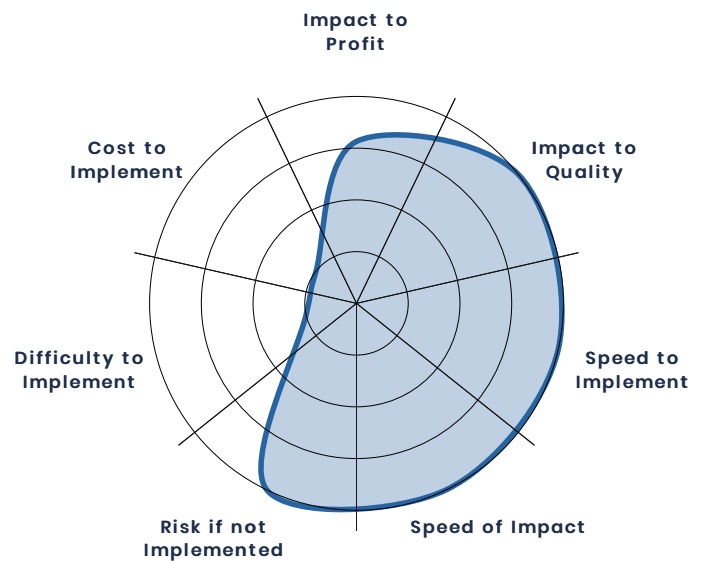
The development team has used the target constituent profiles to identify the jobs, pains, and gains constituents experience.

The development team has created multiple value propositions that specifically address one or a few constituent needs to the greatest possible extent. The development team has pitched the value propositions to the Board of Directors and representatives from the target constituents. The Board and staff have collaborated to select the most viable proposition. The development team reviews the value proposition weekly for the remainder of the development process to ensure ongoing progress reflects the original design.

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STRATEGY / SERVICES



Constituent/Market Research

Constituent research is the process of gathering data to identify the wants and needs of an organization's constituents. Market research is the process of gathering data about other products or services offered to constituents that may fulfill those wants and needs. This research also includes gathering data on what funding sources are available based on the organization's mission and method of impact.

Current State Level 5

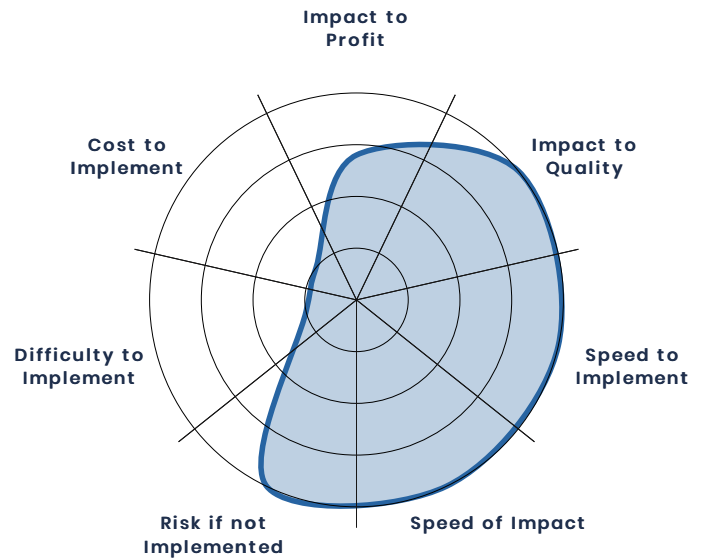
To direct the programming of the organization, the management team has created a body of relevant constituent and market data through analytics, interviews, surveys, experiential learning, third-party research reports, experiments, observations, etc. The management team has compiled its findings into a documented research report and presented the report to the Board of Directors (or a group of advisers if no Board yet exists) for feedback and approval to move forward.

As development progresses, the management team reviews the findings on a monthly basis to ensure ongoing progress is supported by this research.

Improvement Actions:

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STRATEGY / SERVICES



Improving Impact

Improving impact is an on-going development cycle by which an organization continues to evaluate and improve its products and services after they are launched. Impact is the extent to which an organization is fulfilling the purpose stated in its Mission and moving towards its Vision.

For the purposes of this principle, the programming team may be interchangeable with the operations team.

Current State Level 5

Throughout the development process, the programming team regularly reviews the constituent/market research and value proposition to ensure ongoing progress is supported by data findings, and is faithful to the original idea.

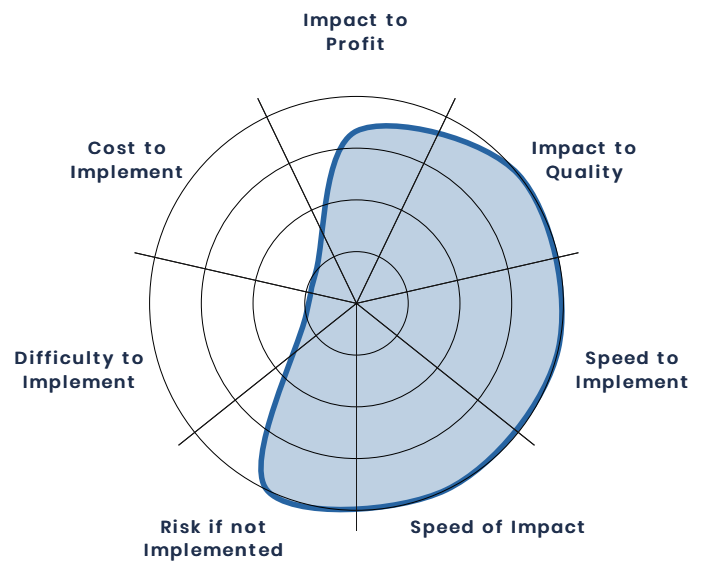
After the product or service is launched, the programming team uses the constituent feedback loop and up to date market data to review the product or service on a quarterly basis.

The programming team invites representatives from all departments to inform this review. As the product or service ages this review becomes less frequent but no less important.

Improvement Actions:

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STRATEGY / CONSTITUENT



Target Audience

Target audience is the group of constituents an organization can impact most effectively. An organization may have multiple target audiences for multiple products or services.

For the purposes of this principle, the programming team may be interchangeable with the operations team.

Current State Level 5

The programming team has worked with representatives from all department, utilizing current engagement data and external market data to identify, test, and affirm primary target audience(s) and secondary target audience(s) for each product or service.

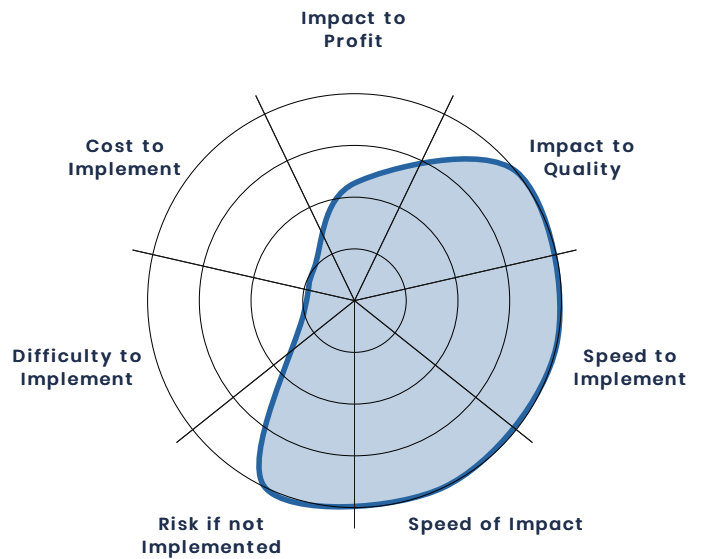
The programming team has clarified geographic, demographic, and psychographic characteristics and engagement behaviors for both audiences.

The programming team has created constituent profiles that visualize target constituents and reviews these profiles on a 6-month basis.

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STRATEGY / CONSTITUENT



Constituent Needs

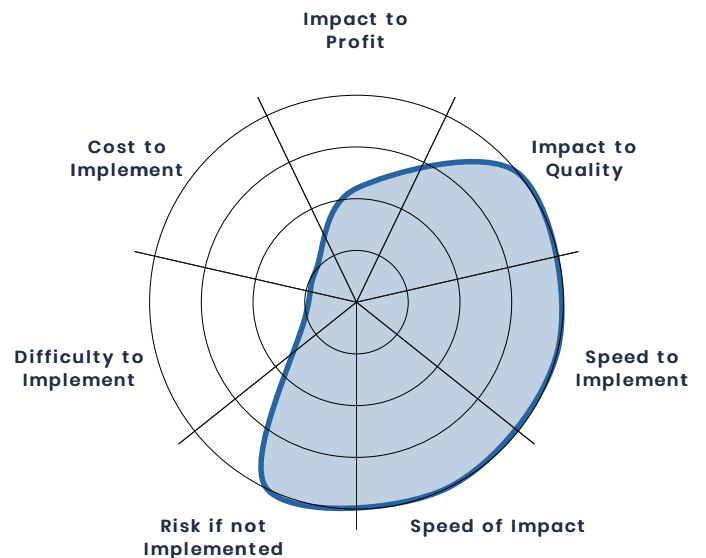
Impacting the needs of constituents is the purpose of the non-profit organization. A need is an opportunity to deliver a benefit to a constituent. Needs are defined in three areas: (1) who has the need; (2) what the need is, and (3) where the need exists.

Current State Level 4

For its most important products or services offered, the programming team has identified (1) who has the need; (2) what the need is, and (3) where the need exists. The marketing team then uses this information to create a clear message of how the organization addresses the need. The marketing team reviews the messaging on a 6-month basis.

Improvement Actions:

- The development team should identify (1) who has the need; (2) what the need is, and (3) where the need exists for all its products or services.
- The marketing team should review its messaging on constituent needs on a quarterly basis, especially for newer products or services.
- The organization should implement a constituent feedback process to determine the effectiveness of the messaging.



STRATEGY / CONSTITUENT



Willingness to Engage

Willingness to engage is a measure of how willing a constituent is to engage with the product or service offered by the organization. Willingness to engage is a balance of what is required from the constituent to participate (risk) and if the constituent sees enough value in the product or service to meet that requirement (incentive).

For the purposes of this principle, the programming team may be interchangeable with the operations team.

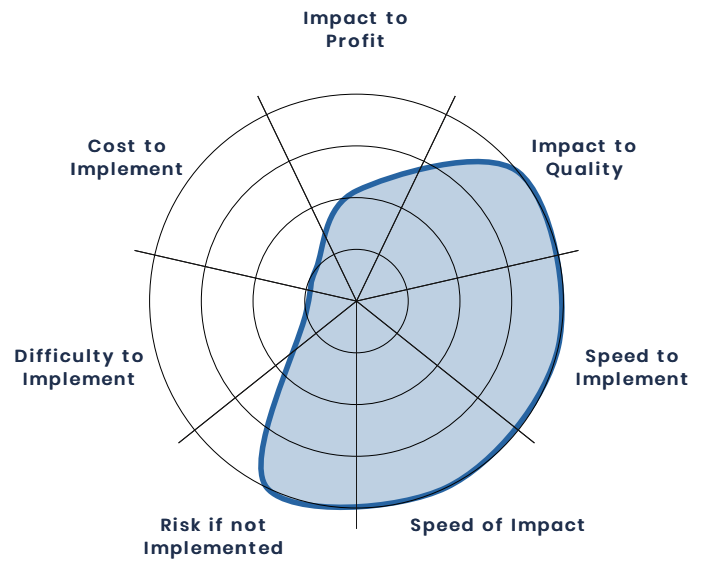
Current State Level 5

The programming team has researched the different methods of measuring willingness to engage and selected the best method for the product or service. The programming team has created a constituent feedback loop to gain a true understanding of the value constituents perceive in relation to the risk. On a quarterly basis, the organization utilizes internal engagement data and the constituent feedback loop to review the incentive of the products and services. On an annual basis, the management team evaluates the engagement data for each product and service and uses the constituent feedback loop to determine the future viability of continuing to offer the product or service.

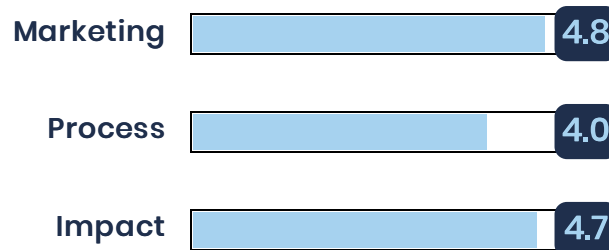
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IMPLEMENTATION



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Celebrate with your team. You have climbed the mountain!

IMPLEMENTATION / MARKETING



Brand Identity

An organization's brand identity is how it wants to be seen by others. Brand Identity articulates the identity of the organization, including its Mission, Vision, and Core Values. Brand Identity is defined in a Brand Style Guide that dictates how the organization should be visually represented, including logos, colors, fonts, photography, names, tag-lines, voice, and core messaging.

Current State Level 5

The marketing and fundraising teams have created a Brand Style Guide that dictates organization logos, colors, fonts, photography, names, tag-lines, voice, and core messaging.

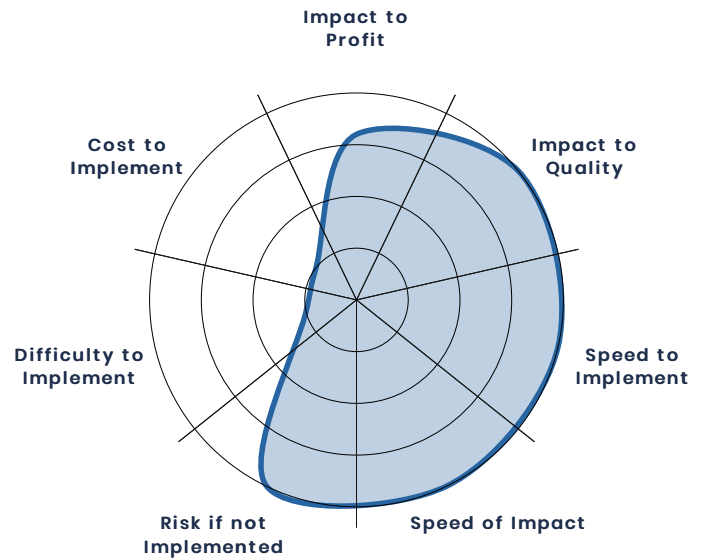
The management team has approved the Brand Style Guide. Staff members and organization partners refer to this guide in all brand representations.

The marketing and fundraising teams review the Brand Style Guide on annual basis to ensure that it continues to align with the desired brand identity.

Improvement Actions:

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IMPLEMENTATION / MARKETING



Marketing Plan

A marketing plan directs marketing efforts towards a specific goal or set of goals.

Current State Level 5

Following the organization's annual strategic planning process, the marketing team reviews the strategic plan and creates its marketing plan to support the organization's goals and initiatives for the year. This plan includes a situational analysis, specific goals, measurements of success, a budget, necessary resources, and a timeline of campaigns and deliverables.

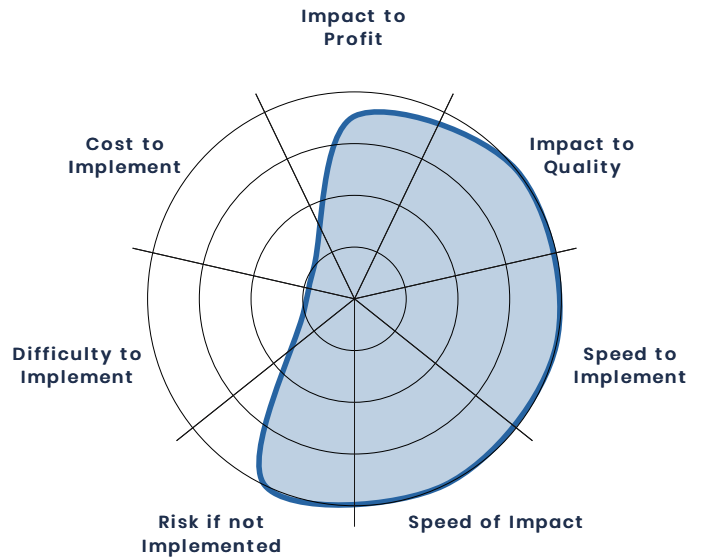
The plan directs and inform all marketing efforts. The marketing team uses analytic data and the constituent feedback loop to review the plan on a monthly basis and adjust accordingly.

At the end of the year, the management team and marketing team then evaluate the success of the plan and adjust for the following year.

Improvement Actions:

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IMPLEMENTATION / MARKETING



Marketing Materials

Marketing materials are the medium by which an organization expresses its message to constituents. These may include newsletters, flyers, social media posts, commercials, print ads, etc.

Current State Level 5

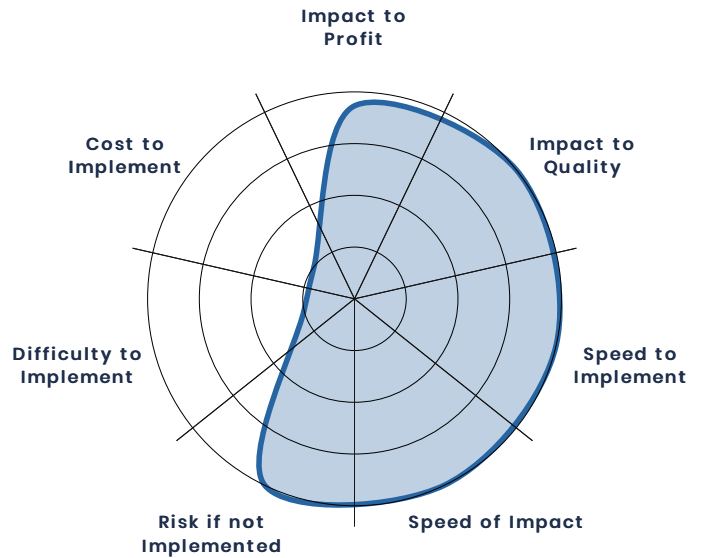
The marketing and fundraising teams have collaborated to identify the best marketing materials for each product or service offered and have created those materials. The marketing team refers to the Brand Style Guide when creating or updating marketing materials.

The marketing and management teams have created a documented process for management team approval of marketing materials. Marketing materials are made available to all staff members to ensure a unified message across the organization. On a monthly basis, the marketing team and fundraising teams review current materials using the constituent feedback loop and analytic data. The marketing team updates current materials and/or develops new ones at least monthly.

Improvement Actions:

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IMPLEMENTATION / MARKETING



Digital Marketing Presence

Digital marketing presence is the extent to which an organization has created a clear and consistent brand across digital outlets, such as website, social media, video-hosting platforms, etc.

Current State Level 4

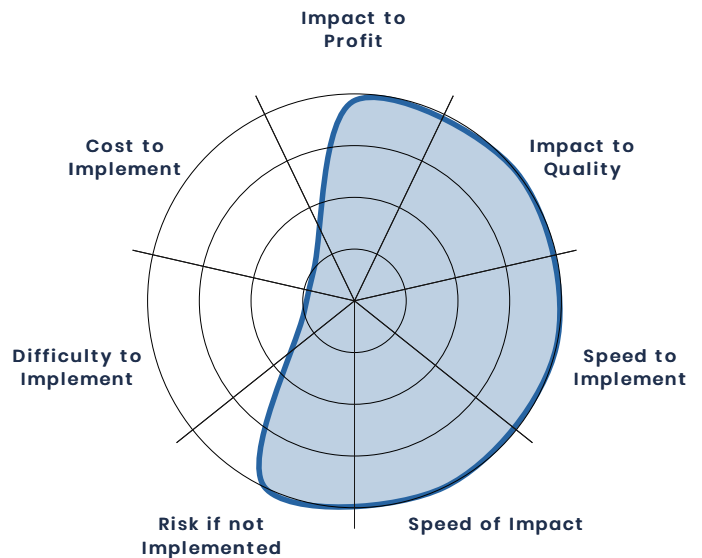
The marketing team actively manages several digital marketing outlets and has implemented digital prospecting tools that provide inbound and outbound automation.

The marketing team consistently and frequently provides relevant and new content that is distributed across multiple outlets to create organization awareness.

On a quarterly basis, the marketing team reviews all digital marketing outlets to determine the return on investment of each outlet.

Improvement Actions:

- On a monthly basis, the marketing team should review all digital marketing outlets to determine the return on investment of each outlet.



IMPLEMENTATION / PROCESS



Key Performance Indicators (KPI's)

A Key Performance Indicator (KPI) is a measurable value that predicts how effectively an organization is achieving its internal objectives. KPI's can be used to measure how effectively an organization is fundraising, communicating to donors, building a social media following, etc.

Current State Level 3

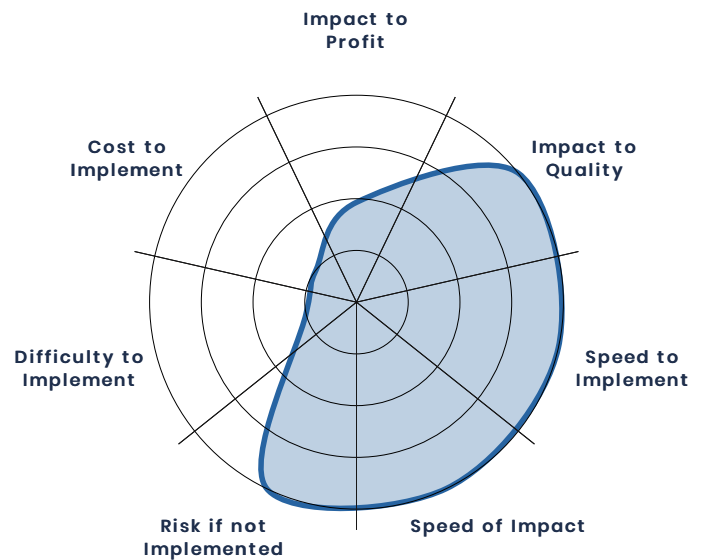
The management team creates or reviews KPI's on an annual basis.

Some departments use KPIs to guide practices. Some departments include the attainment of KPI's in the staff review process.

The management team reviews KPI's on quarterly to 6-month basis and adjusts its practices accordingly.

Improvement Actions:

- The management team should include the creation of Key Performance Indicators (KPI's) in its annual strategic planning process as directed by the strategic plan.
- Each department should review relevant KPI's on a weekly basis and adjust its practices accordingly.
- The management team should review KPI's on a monthly basis and adjust its practices accordingly.



IMPLEMENTATION / PROCESS



Systems

A system is the method by which an organization addresses a challenge in an organized, strategic way often through the use of automation or repeatable solutions. Systems may include a Customer Relationship Management (CRM) tool, an accounting software, Microsoft Office, etc. A systems map is a visualization of how all systems integrate and work together to support the organization's processes.

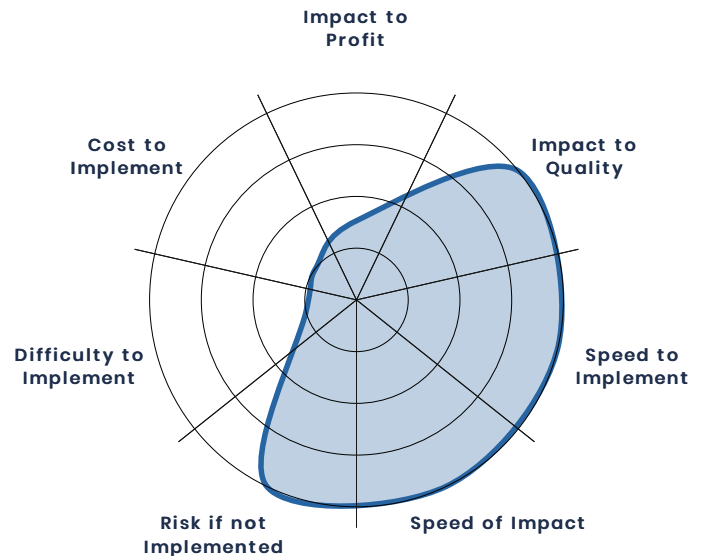
Current State Level 4

Each department has identified or predicted its challenges and created a system that addresses that challenge in a strategic way. Each department has also created a map of its systems and a supporting body of Standard Operating Procedures (SOP's).

Each department reviews and evaluates its systems annually and makes necessary adjustments.

Improvement Actions:

- The Board of Directors should review department's system map for maximum efficiency and collaboration across departments and to ensure systems are aligned with organizational goals and objectives.
- Each department should review its systems on a 6-month to annual basis.



IMPLEMENTATION / PROCESS



Standard Operating Procedures (SOP's)

A standard operating procedure (SOP) is a step-by-step guide that instructs staff members on the most effective and efficient way to complete a process. Staff members are expected to follow SOP's in order to ensure the highest quality of work on a consistent basis.

A systems map is a visualization of how all an organization's systems integrate and work together to support the organization's processes.

Current State Level 5

Using the systems maps, each department has created SOP's that outline in detail the purpose and method of its vital processes.

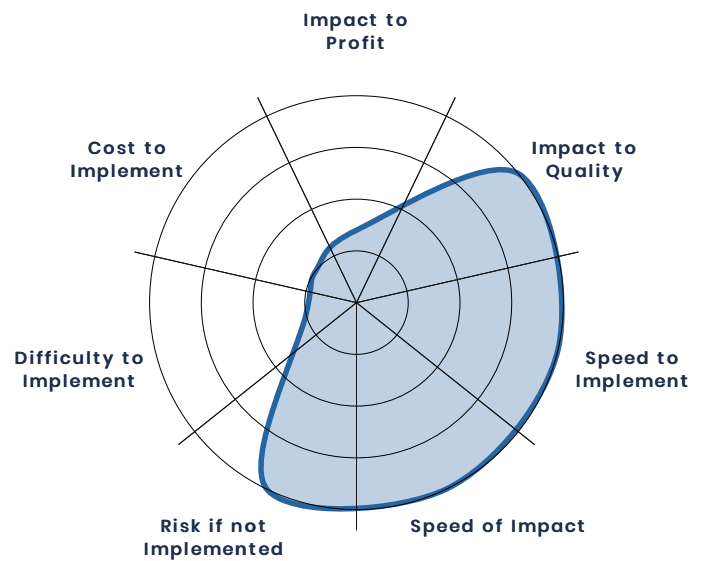
Departments have collaborated on SOPs that involve 2 or more departments and have created channels of communication to ensure effective transitions.

Each department evaluates its SOPs on a 6-month to annual basis to ensure maximum efficiency and quality of output. All SOP's are stored in a central location and digital copies are available to staff members.

Improvement Actions:

Congratulations! Your organization is demonstrating the highest level of readiness and maturity in this principle. You should celebrate this accomplishment and the work it took to get to this level.

Remain intentional and focused. Have a plan so the organization can sustain this maturity level in the long term.



IMPLEMENTATION / PROCESS



Constituent Experience

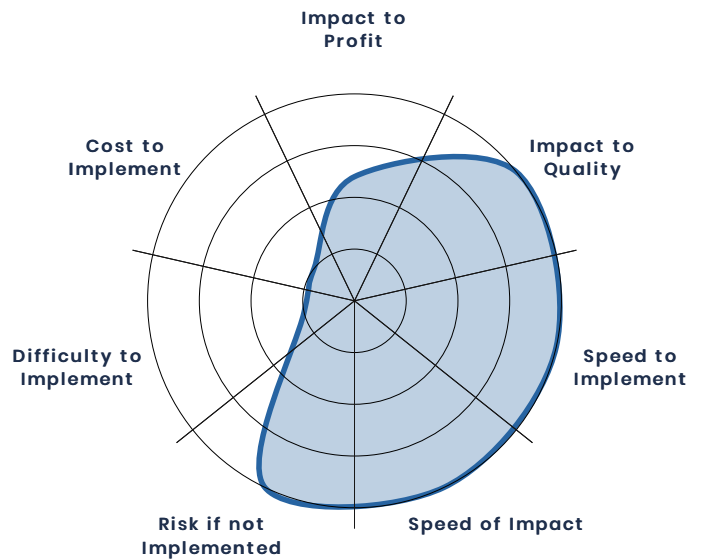
The constituent experience is how a constituent perceives his or her interactions with an organization, both through the offered product or service and beyond.

Current State Level 3

The operations team has created policies and procedures for interacting with the constituents. The operations team reviews the policies and procedures on a 6-month to annual basis.

Improvement Actions:

- The operations team should create a constituent feedback loop that regularly gathers data on how constituents view their experience with the organization.
- The operations team should review the constituent interaction policies and procedures quarterly and be evaluated based on them.



IMPLEMENTATION / PROCESS



Time Management

Time Management is the capability of an organization’s staff to efficiently and effectively use the limited resource of time. While individual staff members may be more capable than others in time management, this principle measures the staff as a whole, starting with the management team.

Current State Level 5

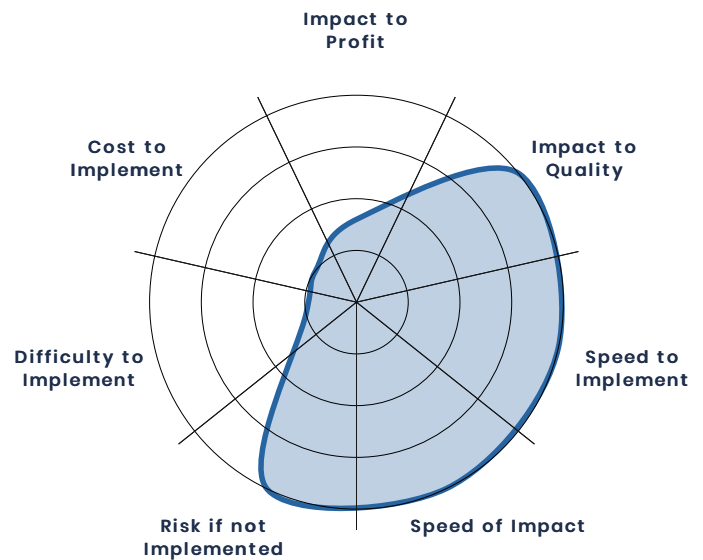
The management team has intentionally created a culture of effective time management. The management team provides training and resources to team members to help them make the most of their time.

The management team respects the time of all staff by conservatively requesting their involvement in projects, meetings, and responsibilities outside of their job descriptions. Meetings throughout the organization are typically scheduled, efficient, and minimal in nature. The management team has created an environment where staff can proactively focus on high priority items and spend minimal time “putting out fires.” Emergencies are rare. Team members are able to predict the pace of their weeks with high accuracy.

Improvement Actions:

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IMPLEMENTATION / IMPACT



Defining Impact Value

Defining Impact Value is the process of "valuing" the organization by comparing the cost of its operations against the impact the organization is creating. Many non-profits create impact that is difficult to quantitatively measure. However, the organization can use this comparison to evaluate its overall stewardship of resources in the process of executing its mission.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

For the purposes of this principle, the programming team may be interchangeable with the operations team.

Current State Level 5

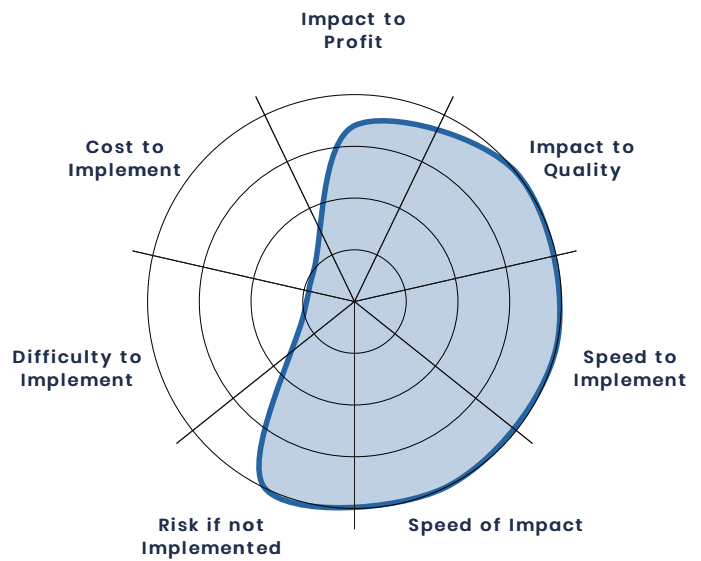
Each program team has defined the cost per constituent to implement its program and has gathered metrics to determine the extent to which the program is creating the desired impact. As part of the annual strategic planning process, the Board of Directors uses this information to determine if the organization's current impact justifies its current use of resources and adjusts operations or allocation accordingly.

If changes are made to programming, the Board provides detailed explanation of its decision to staff, donors, and constituents.

Improvement Actions:

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IMPLEMENTATION / IMPACT



Measuring Impact

Measuring Impact is the process of identifying the specific "benchmarks" and "metrics" that represent the extent to which an organization is creating the impact defined by its mission. Defining these factors is imperative so that organization's activities are appropriately geared towards creating the desired impact and can be redirected if that impact is not being reached.

For the purposes of this principle, the programming team may be interchangeable with the operations team.

Current State Level 4

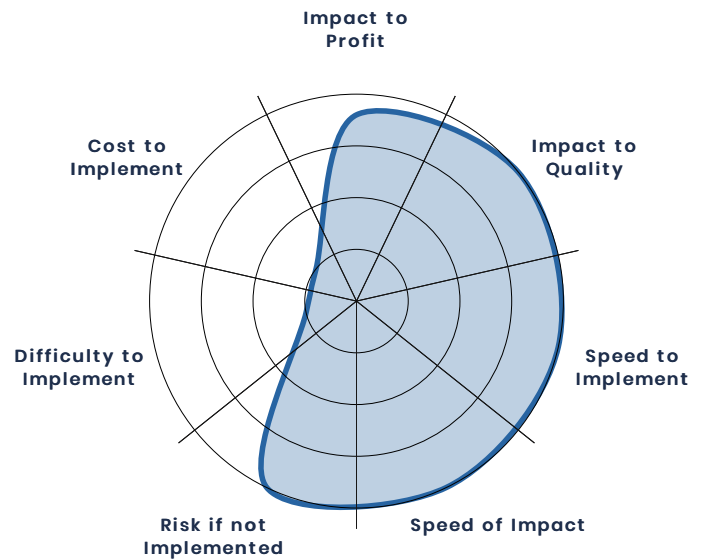
The programming team for each product or service has identified the most appropriate metrics for determining its level of impact. The programming team is in the regular practice of gathering both quantitative and qualitative data in the identified metric fields. The management team compiles and reviews this data on an 6-month basis and adjusts implementation accordingly.

As part of the annual strategic planning process, the Board of Directors reviews this data in context and adjusts any relevant strategies accordingly.

The marketing team uses this data to inform investors about the impact the organization is creating.

Improvement Actions:

- The management team should determine a review frequency that will allow it to respond quickly to unexpected changes in the success of its products and programs.
- The Board of Directors should receive a summary of impact data for each products or service at every board meeting in order to remain aware of the organization's level of impact.



IMPLEMENTATION / IMPACT



Reporting Impact

Reporting Impact is the practice of proactively communicating with and informing an organization's investors, partners, and constituents of the impact an organization is creating in order to ensure on-going trust and partnerships.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

For the purposes of this principle, the programming team may be interchangeable with the operations team.

Current State Level 5

On an annual basis, the management team compiles internal quantitative impact data and qualitative feedback from constituents into an impact report.

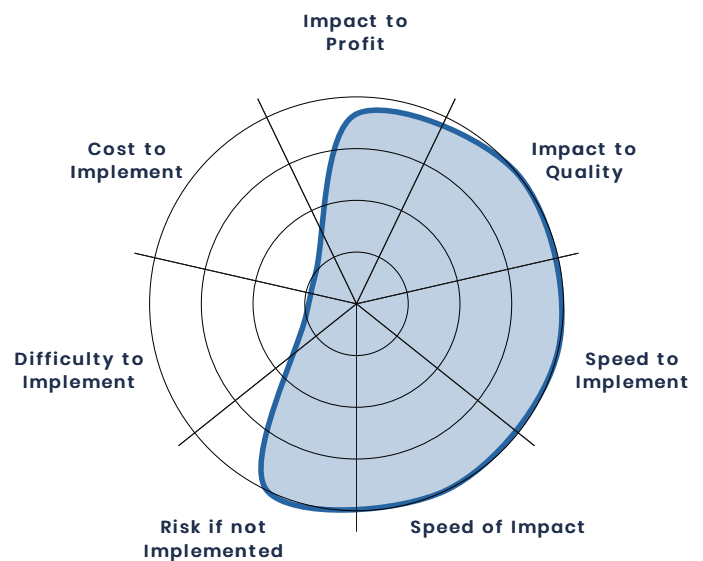
This report also includes contextual information that helps frame the data, strategic goals for the upcoming year, and the organization's budget attainment for the previous year and estimated budget for the upcoming year.

The management team releases this report to staff, partners, investors, and constituents. In addition to the annual report, the marketing team also reports ongoing impact through its marketing materials on a monthly basis.

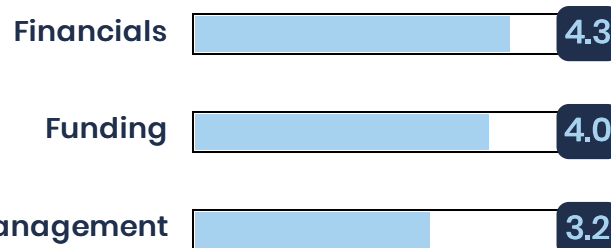
Improvement Actions:

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MONEY



This score represents an organization that demonstrates maturity of thought and action at multiple levels. This score indicates your organization is mastering the principles required to grow and scale the business. Organizations achieving this high score will demand a high value on exit.

Your score reflects maturity of thought in business behaviors. Few organizations make it here. Take a moment to celebrate what your team has achieved. Your next steps are to strive for mastery of thought and correct behavior throughout the entire team, which requires discipline and follow through on all levels.

To grow and scale departmental and team leaders need to:

- drive out any reactivity in the process
- see three (3) years out and create an actionable and effective plan
- measure and analyze business units to drive their own improvement
- create strategies and solutions which drive departmental scale and growth that flows up to the organizational level
- consistently following through with the plans created

MONEY / FINANCIALS



Budgeting

Financial budgeting is the process of creating a quantitative plan that accurately predicts an organization's funding and expenses in order to direct fundraising, operational, programming, and financing decisions.

Current State Level 5

On an annual basis, the management team creates a meaningful and detailed budget for all revenue, cost of programming, and general administrative expenses. Fundraising and marketing costs are separated to provide clear management of these areas.

The management team completes the budget for the following organization's year at least 2 months prior to the end of the current fiscal year. The Board of Directors then approves the budget as part of the annual strategic planning process.

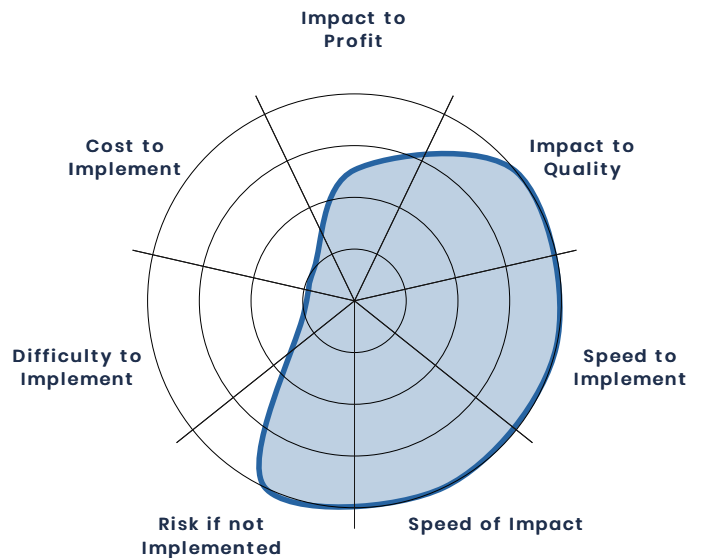
The management team reviews the budget monthly to ensure the organization is meeting expectations and reports this to the Board of Directors. Following the monthly review, each member of the management team reports relevant budget-related information to his or her department.

The department works as a team to create solutions to budget challenges.

Improvement Actions:

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MONEY / FINANCIALS



Forecasting

Financial forecasting is the process of predicting an organization's financial outcomes for a future period of time.

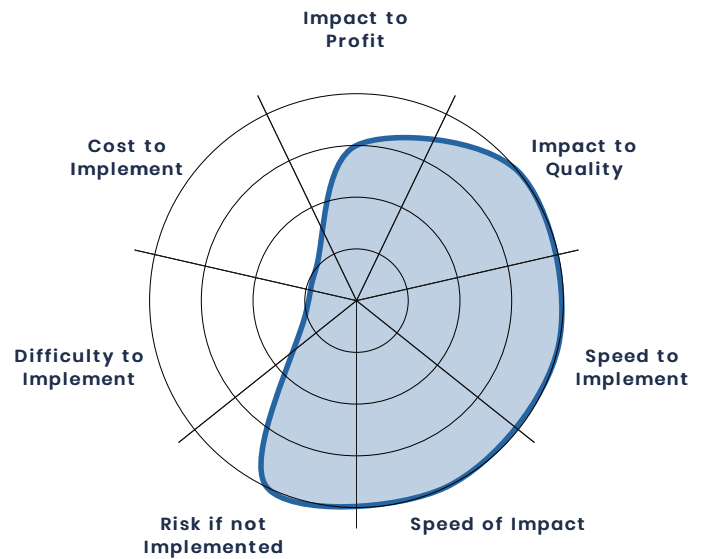
For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 3

On a quarterly basis, the finance team forecasts organization performance against budget for at least the next quarter. The finance team reports the forecast to the management team as needed.

Improvement Actions:

- Quarterly, the finance team should use internal analytic data to inform its forecast and should create a forecast for at least the next 2 quarters.
- Monthly, the management team should review the forecast for the upcoming quarter.
- The Board of Directors should review the forecast at each meeting.



MONEY / FINANCIALS



Managing by Financials

Managing the organization by the financials is the practice of consistently monitoring and guiding the financial state of the organization. This includes reporting the financial state of the organization to stakeholders.

The organization should be on an accrual basis of accounting unless specifically directed by their accountant to be on a cash basis.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 5

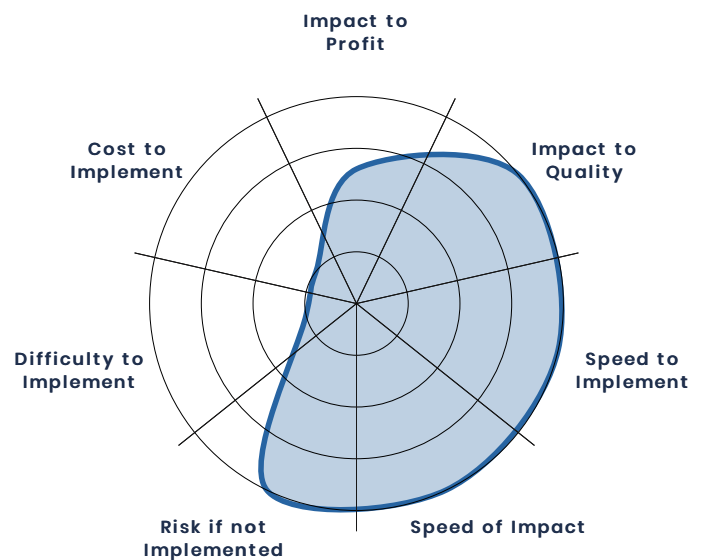
The finance team produces monthly financial statements on an accrual basis that include a balance sheet, income statement, statement of cash flows, and show attainment of budget percentages, where applicable.

The finance team prepares these monthly financial statements by the 10th of the following month and presents them to the management team for review. The management team understands how the financial statements relate to each other and how dollars flow through the financials. The management team refers to the financials in all relevant decision making.

Improvement Actions:

Congratulations! Your organization is demonstrating the highest level of readiness and maturity in this principle. You should celebrate this accomplishment and the work it took to get to this level.

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MONEY / FUNDING



Cash Flow Management

Cash Flow Management is the process of understanding and controlling how cash is generated (forecasting/budgeting) and used (proper expense tracking) in order to plan and execute on a consistent basis.

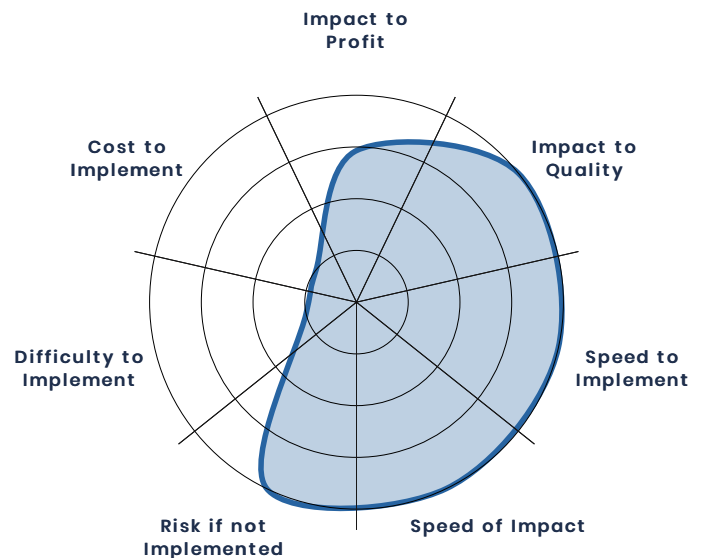
Current State Level 5

The finance team has implemented accounting systems that provide full-cash-tracking capabilities. The finance team can produce financial statements that show all expected incoming and outgoing cash. The management team can predict revenue and expenses for next 90 days with a high degree of accuracy. The management team makes adjustments to the organization's activity accordingly. In each meeting, the Board of Directors reviews cash reports that show the cash flow/profit trends of the organization and discusses how the cash position might affect strategic goals.

Improvement Actions:

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MONEY / FUNDING



Cash to Operate

Cash to Operate is a formula designed to calculate the number of months an organization can continue to operate with its current cash position. The formula takes into account the sum of cash currently held by the organization, a portion of the expected income for the next 6 months, and other available financial sources, such as lines of credit. That number is then divided by the average monthly cost to operate the organization.

$\text{Annual operating cost} / 365 = \text{daily operating cost}$

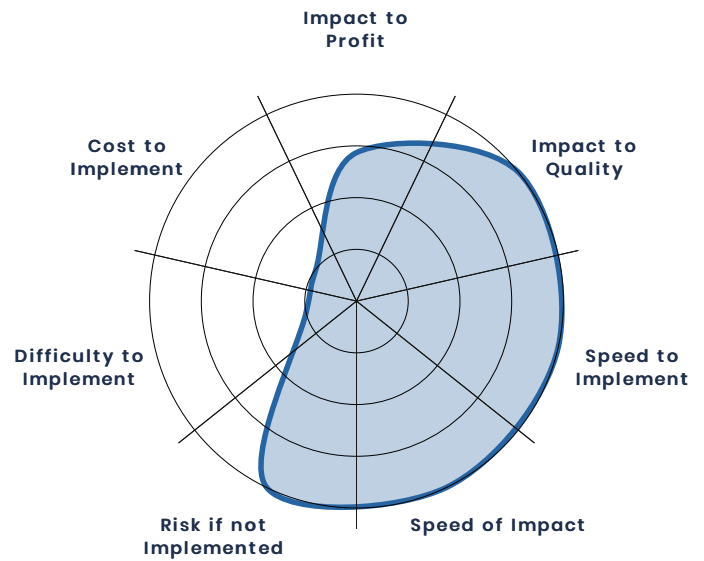
$\text{Cash on hand} + \text{cash equivalents} / \text{daily operating cost} = \text{days of cash to operate}$

Current State Level 4

The organization has 6-9 months of cash to operate. The management team reviews cash to operate monthly.

Improvement Actions:

- If the organization has less than 6 months cash to operate, the management team should review the organization's practices and determine which are creating a consistent return on investment (ROI) and which are not.
- Practices that are not generating consistent ROI should be addressed immediately.



MONEY / FUNDING



Funding Strategy

A funding strategy is the method by which an organization seeks to evaluate and predict the current and future needs of the organization and acquire the necessary resources for current operations and future growth. This refers to the decision-making process in which an organization decides how it will be funded (investors, grants, membership dues, etc.), and the types of funding sources it will pursue (one-time, recurring, in-kind, etc.).

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 3

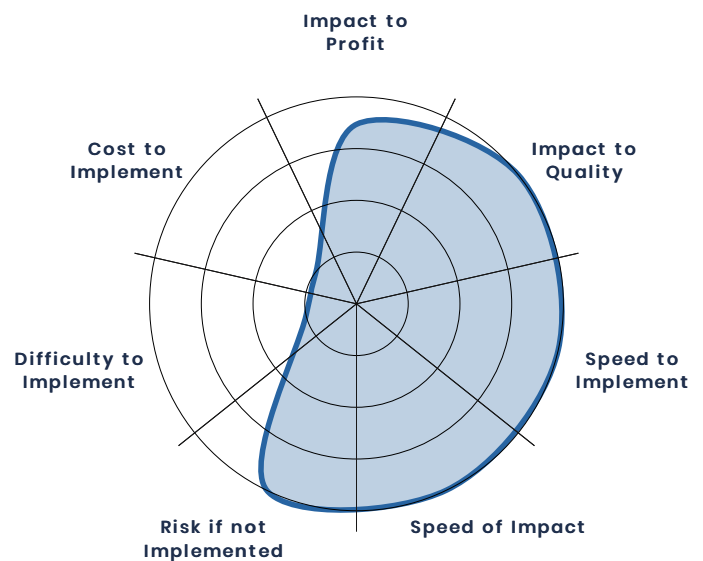
The Board of Directors has created a funding strategy that includes current and forecasted program growth, cash flow projections and expenditures, specific risks to operations, and a list of potential funding sources and types.

The Board of Directors reviews and updates this strategy on a 6-month to annual basis.

The fundraising team has a specific plan to provide at least 9 months of operational runway.

Improvement Actions:

- The Board of Directors should perform a funding SWOT analysis and identify and prioritize funding sources and types.
- The Board of Directors should use this data to create a 3-year funding strategy that includes current and forecasted program growth, cash flow projections and expenditures, specific risks to operations, and a list of potential funding sources and types.
- The Board of Directors should review and update this strategy quarterly. Six months prior to the expiration of the current strategy, the Board of Directors should begin creating a new funding strategy.
- The fundraising team should have a specific plan to provide at least 12 months of operational runway.



MONEY / INVESTOR MANAGEMENT



Funding Mix Management

Funding Mix Management is the process of assessing the mix/source of funding to ensure the organization is not at risk due to an over reliance on too few investors or investment types. This includes tracking and evaluating the funding stream in terms of recurring versus one-time funding sources.

For the purposes of this principle, the Board of Directors may be interchangeable with the management team.

Current State Level 4

The fundraising team tracks all funding sources and types (recurring, one-time, in kind, etc.) as a percentage of total funding.

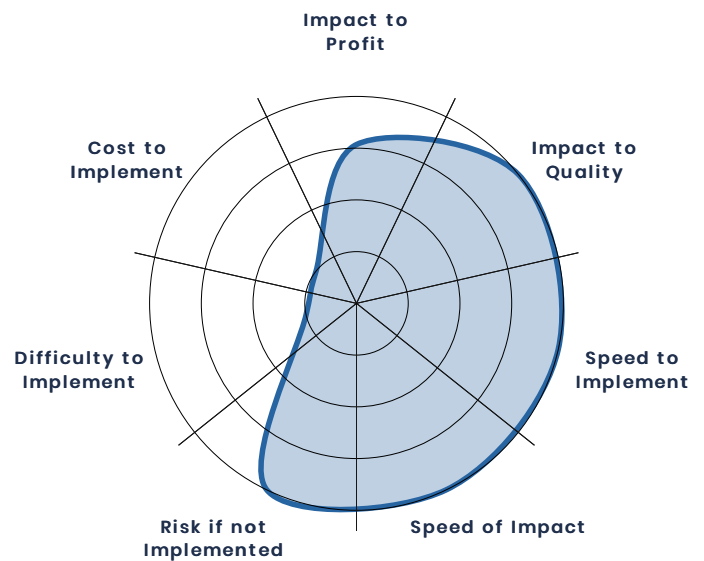
The fundraising team has identified its ideal funding mix and directs its fundraising efforts towards reaching this goal.

The fundraising team reviews these numbers on a quarterly basis.

The management team knows when the organization has become too dependent on one or a few funding sources. The management team uses the funding mix to inform the annual strategic planning process.

Improvement Actions:

- The fundraising team should create automated systems that alert the team if the funding mix becomes unbalanced.
- The fundraising team should review the current and goal funding mix numbers on a monthly basis to quickly identify and respond to imbalances.
- The management team should also review the current and goal funding mix numbers on a quarterly basis for planning purposes.



MONEY / INVESTOR MANAGEMENT



Investor Profiles

Investor profiles are clearly articulated personas that represent one or more target audiences for an organization's fundraising efforts. Profiles include characteristics about the audience, including demographic, geographic, and psycho-graphic characteristics. An organization uses investor profiles to determine how to effectively engage that group of donors and potential donors.

Current State Level 3

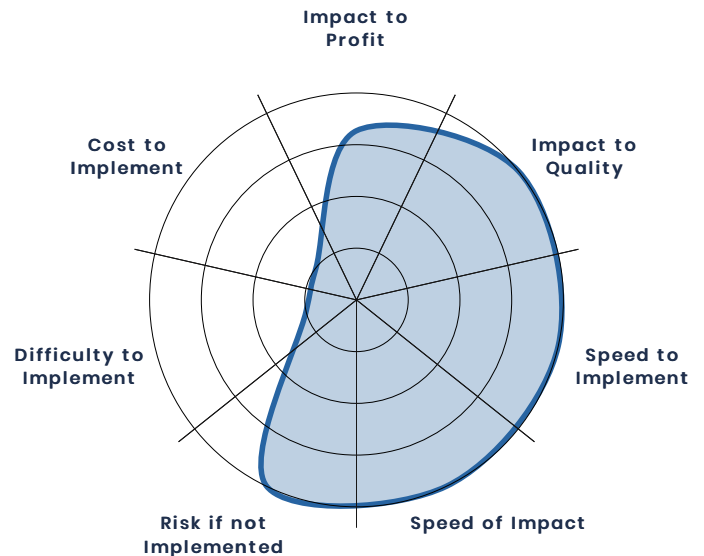
The marketing team has identified the most important target investor audience and loosely sketched characteristics of this audience.

The marketing team considers this profile when crafting and distributing its messaging.

The marketing and fundraising teams review these profiles on an as-needed basis.

Improvement Actions:

- The marketing team should work together with the fundraising team to identify at least 3 target investor audiences.
- The teams should then identify the jobs, pains, and gains for each audience.
- The marketing team should use these profiles to craft and distribute specific messaging that is relevant to these audiences.
- The teams should review the profiles on a scheduled basis.



MONEY / INVESTOR MANAGEMENT



Investor Engagement Process (The Funnel)

The investor engagement process is the method by which an organization turns prospective investors into active investors. This includes all funding types and sources. It identifies the different ways investors may give - one time, recurring, in kind, etc. - and includes an awareness, engagement, and retention phase for each donation type. It also includes the "buckets" an organization uses to capture prospects, such as website/social media presence, events, etc. This is often referred to as the "Funnel" because it filters a wide body of prospects down to a smaller body of active donors.

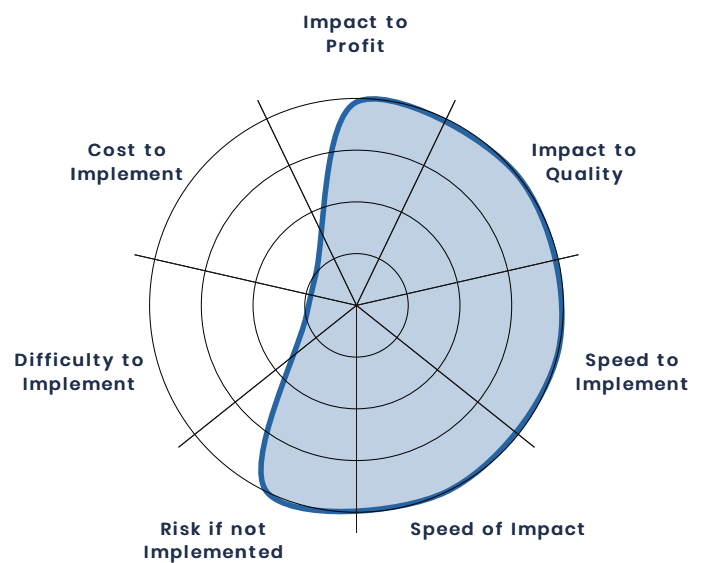
Current State Level 2

The fundraising team has identified some steps in the donor engagement process and identified some specific fundraising lead areas or "buckets" it uses to capture prospective donors.

The fundraising team has a Customer Relationship Management (CRM) platform. Some fundraisers use the CRM to manage the donor engagement process. The fundraising team reviews certain parts of the donor engagement process on an as-needed basis.

Improvement Actions:

- The organization should understand the importance of having a clearly defined and documented donor engagement process or "Funnel" to capture and drive prospective donors towards commitments.
- The fundraising team should identify the organization's products and services and then articulate the awareness, engagement, and retention phases of each, as they may differ in process.
- The team should then identify the fundraising lead areas or "buckets" used to capture prospective donors.
- The fundraising team should then document the donor engagement process from start to finish within the Customer Relationship Management (CRM) platform selected by the organization.



MONEY / INVESTOR MANAGEMENT



Investor Experience/Retention

The investor experience is how an investor perceives his or her interactions with an organization, both in the course of his or her investment and beyond. Investor retention is the rate at which an organization retains the same investors over a period of time. Investor retention is the result of investor experience.

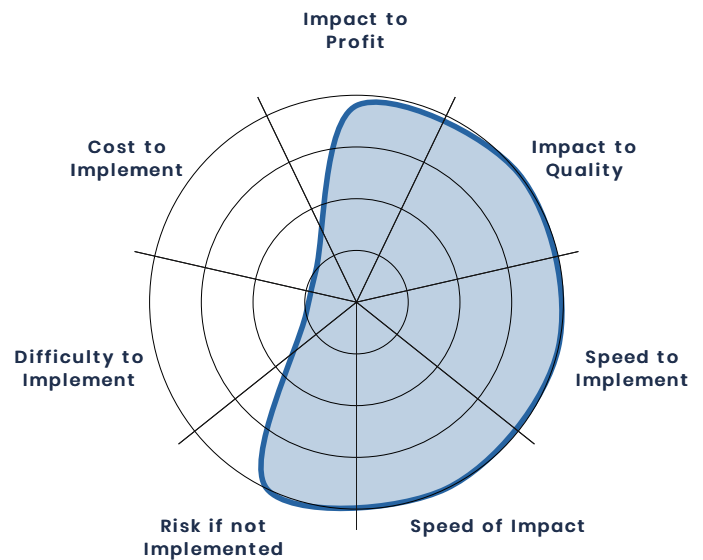
Current State Level 4

The fundraising team has created policies and procedures for interacting with investors that embody the organization's Identity Statements. All investor-facing staff review these policies and procedures on an annual basis.

The fundraising team provides regular updates to investors about the impact their investment is funding. On at least an annual basis, investors are recognized and thanked in a method reflective of the size of their investment.

Improvement Actions:

- The fundraising team should create an investor feedback loop that regularly gathers data on how investors view their experiences with the organization.
- All investor-facing staff should review the investor relations policies and procedures on a 6-month basis.



PEOPLE



Congratulations! This score represents an organization that demonstrates the highest level of maturity and capability in both thought and action. This score indicates your organization has achieved high levels of involvement and integration at all levels. Organizations achieving this high score demand the highest values on exit.

Celebrate with your team. You have climbed the mountain!

PEOPLE / TEAM



Team Chart Management

Team charts consist of both organizational and accountability charts.

Organizational charts outline all relationships between roles in the organization and clearly articulate chains of command and reporting.

An accountability chart is a visualization of all of the tasks and processes that are required for an organization to effectively operate. These tasks and processes are categorized by the roles that are responsible for executing them - assigned to the employees who own each role.

Current State Level 4

The management team has created both an organizational chart and accountability chart for the entire organization.

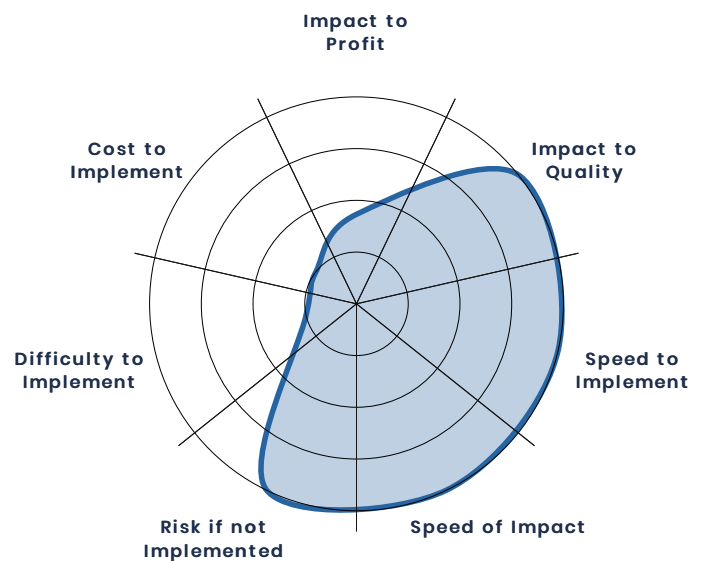
The management team has eliminated "chain of command" confusion. Each staff member has a clear understanding of the roles and responsibilities assigned to his or her position.

On a six-month basis, the individual business units review the accountability and organizational charts for continued relevancy and effective allocation of responsibilities.

As part of the annual strategic planning process, the management team reviews the team charts to identify gaps within the organization in terms of needed personnel, skills, or processes.

Improvement Actions:

- The management team should ensure that each staff member not only understands his or her roles and responsibilities clearly, but feels they have the capacity to execute them well.
- The management team should be in the regular practice of identifying and addressing over-committed staff members.
- The individual departments of the organization should review their sections of the organizational and accountability charts on a quarterly basis in order to account for changes in the organization.



PEOPLE / TEAM



Succession Planning

Succession planning is the practice of proactively identifying in-house candidates for higher-level positions and developing those candidates to succeed before assuming the new role.

Current State Level 5

The management team has created a culture of ongoing education and development that empowers staff members to prepare for and obtain higher level positions.

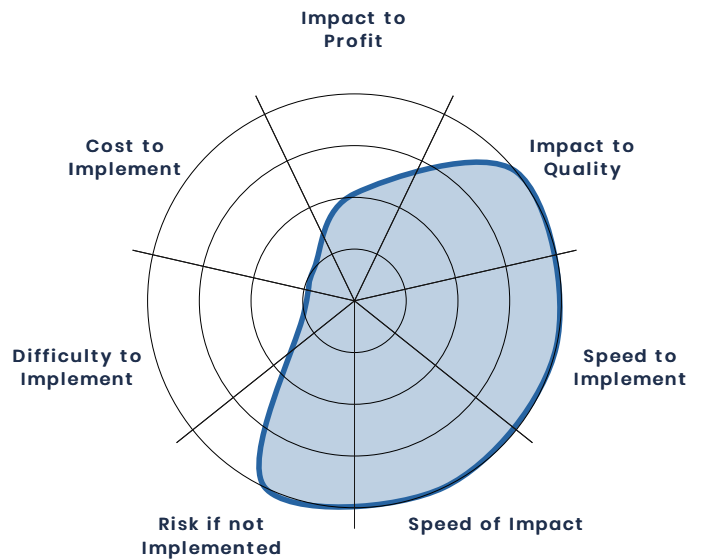
On a quarterly basis, the management team and representatives from each department identify in-house candidates for higher-level positions or responsibilities and work with the candidate to create a development plan.

The management team then works with the department to ensure candidates are developing on pace to succeed in the new position or role.

Improvement Actions:

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Remain intentional and focused. Have a plan so the organization can sustain this maturity level in the long term.



PEOPLE / TEAM



Staff Evaluation and Development Planning

A staff evaluation identifies an employees performance against the goals, required skills, and objectives for continuous improvement in his or her position. A development plan identifies the skills and resources necessary to support the staff member's career goals and the organization's needs.

Current State Level 5

Each department has identified the responsibilities and expectations for each position, including technical, cultural, and soft skills development. Staff members review these responsibilities and expectations on at least a 6-month basis.

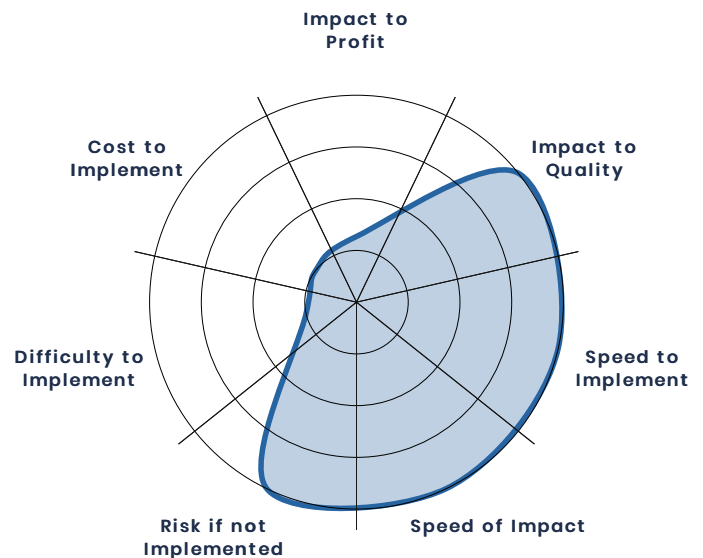
The management team communicates performance to staff members outside of evaluations and address problems as soon as possible. Evaluations are performed quarterly and include both manager and peer reviews and provide ample opportunities for staff members to respond to their reviews.

The management team regularly identifies and rewards exceptional performances, especially performances that demonstrate the Identity Statements in actions and words.

Improvement Actions:

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PEOPLE / TEAM



Team Engagement

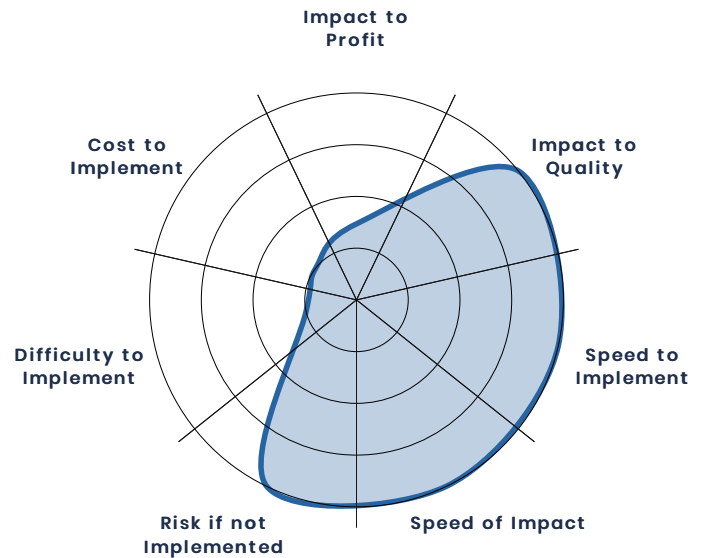
Team engagement is a measurement of how emotionally, mentally and socially engaged employees are in their work and in the culture of the organization. Managing engagement is the practice of both (1) measuring employee engagement by defining KPI's that track and evaluate how engaged employees are in their positions; and (2) using these measurements to inform managerial and cultural practices.

Current State Level 4

The management team and individual managers are aware of obstacles that impact engagement, both for individual team members and for the staff as a whole. The management team reviews progress on these obstacles on a quarterly basis and quickly responds to indicators of disengagement.

Improvement Actions:

- The management team should define engagement related KPIs and implement systems for accurately measuring and tracking these indicators.



PEOPLE / CULTURE



Defining Culture

Defining culture is the process of using the Identity Statements of an organization to inform how its staff members, including volunteers, will behave towards one another, build relationships, prioritize responsibilities, and represent the organization.

Current State Level 5

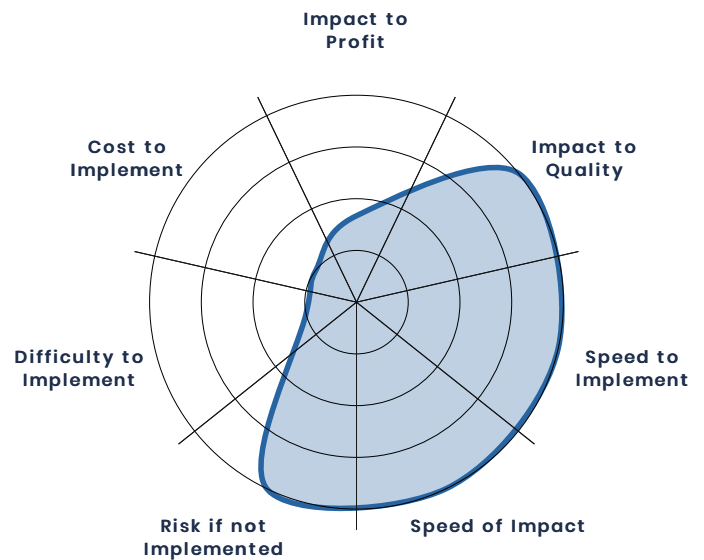
The Board of Directors has clearly articulated the Identity Statements. The management team has then defined how the Identity Statements should be expressed through the culture of the organization and is in the regular practice of communicating this to staff, volunteers, and constituents.

Everyone, from the Board of Directors to the support staff, regularly talks about the Identity Statements and how they can be expressed in day to day activities.

Improvement Actions:

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PEOPLE / CULTURE



Managing Culture

Managing culture is the practice of monitoring and evaluating an organization's cultural performance compared to its desired culture, identifying cultural opportunities and addressing cultural challenges or issues.

Current State Level 5

The management team consistently seeks open and honest feedback from staff and constituents regarding their thoughts and impressions of the culture of the organization. Staff feel comfortable and safe providing this feedback.

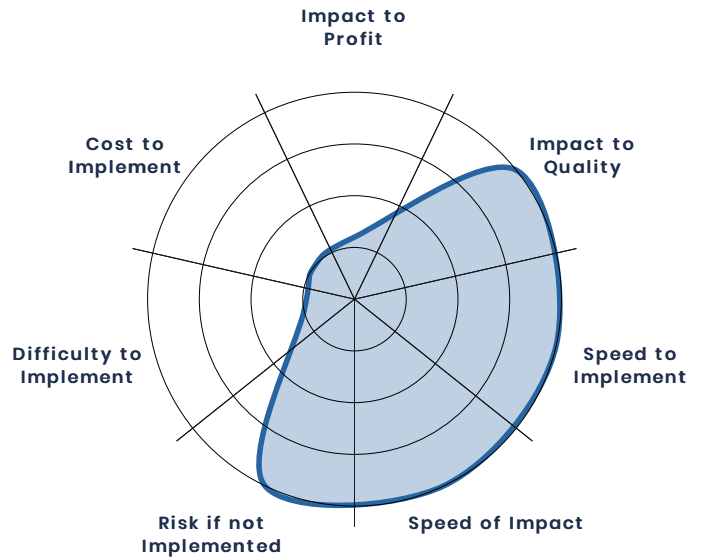
The management team consistently responds to the feedback and involves staff in finding solutions to cultural challenges.

The management team protects its culture by ensuring the staff hired are a cultural match and staff evaluations are based on how the staff member is supporting the defined culture.

Improvement Actions:

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PEOPLE / CULTURE



Work/Life Balance

Work/Life balance is the ratio of emotional, mental, and physical energy directed towards work versus that directed towards life outside of work. This includes not just time spent at work, but also time spent thinking or worrying about work, and personal resources invested in work.

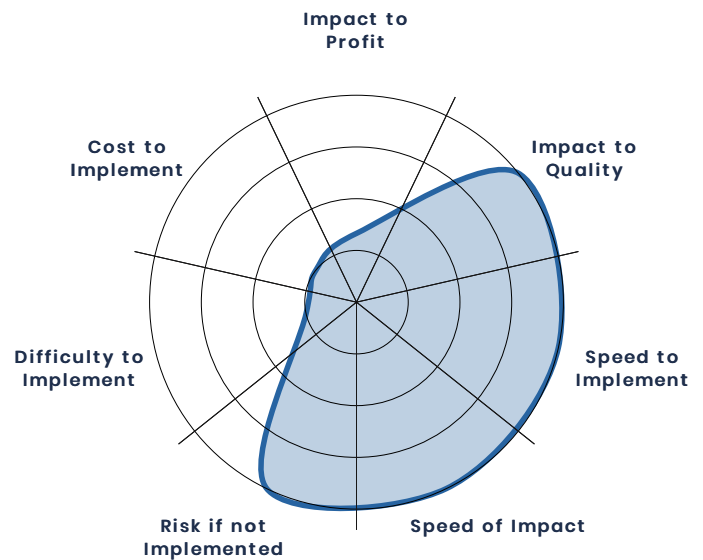
Current State Level 2

Managers see work/life balance as a personal issue that each employee must address for themselves. Some employees are better than others in creating work/life balance for themselves.

Some employees ask for time off or assistance delegating duties. Many employees do not use all their PTO in a year.

Improvement Actions:

- All managers should work to create a unified approach to work/life balance
- All employees should be asked to give feedback on work/life balance during quarterly reviews and hiring and exit interviews.
- Managers should work to be more in tune with employees who may be struggling to create work/life balance before the imbalance affects the employee's performance or engagement.
- Managers should work to create an environment where employees feel comfortable requesting assistance in creating work/life balance, including time off and assistance delegating duties when overwhelmed.



PEOPLE / HUMAN RESOURCES



Staff Compensation

Staff compensation is the full value of rewards an employee receives from the employer in exchange for his or her labor. Compensation includes financial incentives, tangible services, and benefits.

Current State Level 5

The management team has reviewed all federal and state compensation laws, the strategic goals of the organization, and its desired cultural attributes and has created a scaling compensation package based on skills and experience.

The organization uses the compensation package as a method of recruitment and retention by helping prospective and current staff members understand the full value of what the organization has to offer.

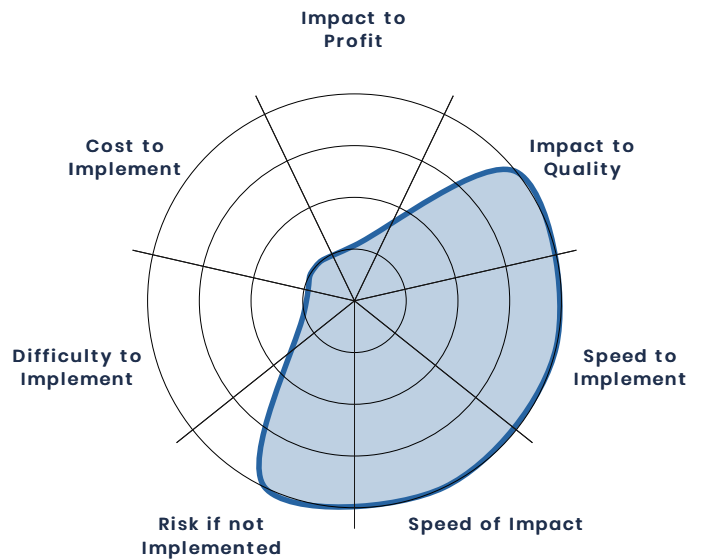
The HR team has created policies and procedures that protect the privacy and interests of the organization through all compensation negotiations.

On a 6-month basis, the HR department uses market research and the staff feedback loop to make suggestions to the management team for general compensation adjustments. Simultaneously, the manager from each department uses reviews to make suggestions to the management team for individual compensation adjustments.

Improvement Actions:

Congratulations! Your organization is demonstrating the highest level of readiness and maturity in this principle. You should celebrate this accomplishment and the work it took to get to this level.

Remain intentional and focused. Have a plan so the organization can sustain this maturity level in the long term.



PEOPLE / HUMAN RESOURCES



Hiring Process

Hiring is the action of an organization to obtain human resources that meet both the technical and educational needs of the position and contribute to the organization's culture. The hiring process refers to the means by which organizations find, evaluate and onboard new employees.

Current State Level 5

Each department has identified and documented a job description and qualifiers for all positions.

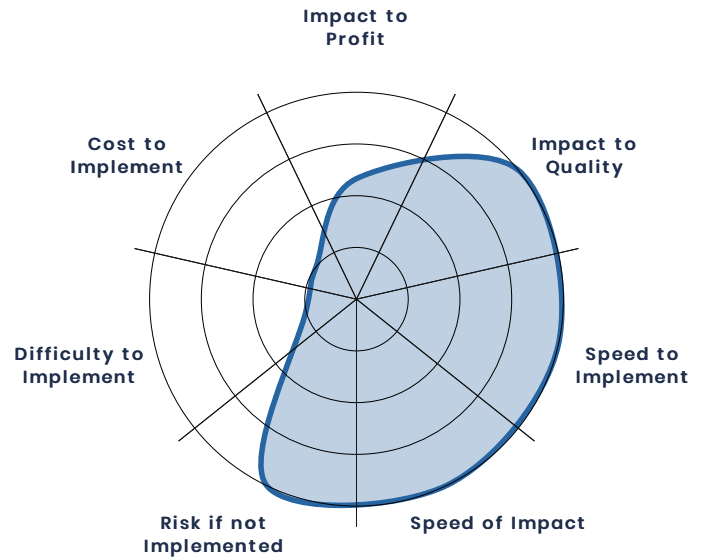
HR has created a uniform hiring process that includes personal and skill assessments, multi-level interviews, and robust candidate research. HR has created policies and procedures for communicating with and interviewing potential candidates that are compatible with federal and state laws and protect the privacy and interests of the organization and its current staff members.

The organization hires the best candidate based on the process developed and not on a "gut instinct." HR and the management team review the hiring process and policies on a 6-month basis or at a frequency relevant to the hiring needs of the organization.

Improvement Actions:

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PEOPLE / HUMAN RESOURCES



Employee Compliance & Handbook

Employee compliance is the requirement of an organization's employees to comply with federal and state laws concerning market-related compliance, IRS requirements, and behavior/ethics requirements. An Employee Handbook is a documented guide that clearly articulates these requirements, as well as the organization's internal expectations, appropriate and inappropriate behaviors, the legal rights of both the organization and the employee, and the consequences for breach of policy.

Current State Level 5

The management team has reviewed federal and state laws for market-related compliance requirements, payroll withholding requirements, and behavior/ethics requirements. The management team has used these requirements in addition to the Identity Statements and desired cultural attributes to create an employee handbook that clearly articulates organization expectations, appropriate and inappropriate behaviors, the legal rights of both the organization and the employee, and the consequences for breach of policy. The HR team requires all new staff members to review and sign the employee handbook immediately upon employment. Current staff members review and sign the employee handbook on an annual basis. As part of the annual strategic planning process, the management team reviews and evaluates the employee handbook with outside legal counsel and communicates any changes to the staff prior to the annual staff review.

Improvement Actions:

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